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ABSTRACT

Results of evaluating the Financial Aid for Colleges and Technical Schools (FACTS) Program are presented, along with recommendations for the program. The program placed college work/study students in New York City public high schools to help high school students complete financial aid applications for postsecondary education. In 1985-1986, more than 75 associates plus an additional 26 school volunteers helped students complete financial aid applications at 91 high schools. The student associates worked an average of 10.5 hours per week and were supervised daily. In addition to identifying FACTS program goals and indicators of the extent of goal achievement, information is included on program organization and implementation, training and productivity of the associates and their bilingual ability, and staff perceptions and suggestions. Five recommendations are offered, including: program staff and college advisers should develop a systematic approach to increase students' awareness of the program; and the advisory board should increase the number of associates in each high school or the number of hours each associate works. Participating high schools are listed. (SW)

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FACT$ PROGRAM
1985-1986
FINAL REPORT

OEA Evaluation Report

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Evaluation Section Report
Robert Tobias, Administrator
John E. Schoener, Senior Manager
December, 1986

FACT$ PROGRAM
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Selma Gross, Administrator
Office of College and Career Planning

Edward M. Powers
Project Coordinator

Prepared by the
High School Evaluation Unit

Dolores M. Mei
Evaluation Manager

James T. Langlois
Evaluation Associate

Jeffrey Ringle
Evaluation Consultant

New York City Public Schools
Office of Educational Assessment
Richard Guttenberg, Director

SUMMARY

The Financial Aid for Colleges and Technical Schools (FACT$) Program placed college work/study students, called FACT$ associates, in New York City public high schools to provide students with assistance in filling out applications for financial aid for their post-secondary education. Private and public universities provide college students paid by federal work/study funds to the project, while the Board of Education provides program administrators as well as part of the work/study funds.

In 1985-86, more than 75 associates plus an additional 26 School Volunteers helped students fill out financial aid applications at 91 high schools. The program coordinators provided the associates and volunteers with pre-service and in-service training. On a day-to-day basis they were supervised by the college advisors at the high schools. Work/study eligible students were identified by the colleges and then recruited, screened, and assigned by the coordinator. They worked an average of 10.5 hours per week, spending an average of a little more than one-half hour with each student they helped.

While the productivity of the associates varied considerably from school to school, college advisors were virtually unanimous in their support of the program. It was clear that it provided a valuable service that schools could not provide with their own limited resources.

Based on the findings of the evaluation, the following specific recommendations are made:

- program staff should set clear priorities for selecting which students are to be served first by the program;
- program staff should work with college advisors to develop a systematic approach to increasing students' awareness of the existence of the program;
- the advisory board should explore ways of increasing the number of associates in each high school or increasing the number of hours each associate can work;
- program staff could examine the factors related to high productivity in associates so that these factors can be fostered throughout the program; and
- program staff should expand the training of associates to include such specifics as helping students to understand how to fill out the income tax section of forms for students in various circumstances.

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I. INTRODUCTION

BACKGROUND

The Financial Aid for Colleges and Technical Schools (FACT$) Program of the Office of College and Career Planning places college students in New York City high schools to provide pupils with assistance in filling out forms for financial aid for post-secondary education.

The program was first implemented on a limited basis in the New York City public schools during the 1977-78 academic year. The Director of Undergraduate Admissions at New York University (N.Y.U.) aided the program by recruiting and training N.Y.U. work/study students as program associates. The FACT$ associates disseminated financial-aid information to high school students and assisted them in completing the appropriate financial-aid forms. This assistance was well received at the first four high schools and the program was subsequently expanded. In 1979, the New York City Board of Education made a formal commitment to FACT$ by providing a central office, salaries for a full-time administrator and an assistant, and part of the work/study funds. At about the same time, the New York School Volunteer Bureau offered the services of its volunteers and a part-time coordinator.

In October, 1984, FACT$ became part of the Office of College and Career Planning in the Division of High Schools. Since then, the program has expanded to serve 91 high schools with over 75

associates and 26 volunteers.

Rationale for the FACT$ Program

According to program developers, the escalating cost of tuition and general economic conditions are among the factors which have discouraged and inhibited many students from applying to college. These factors have a stronger impact on low- and middle- income families, especially minorities and immigrants. Financial aid could help many of these students to attend post-secondary schools. College advisors in the high schools are expected to inform students of the sources of financial aid and, if possible, to help them fill out the increasingly complex application forms. However, the high ratio of students to college advisors in New York City public schools (approximately 800:1) makes this an impossible task. The FACT$ program was developed to provide associates to help the advisors reach greater numbers of students in a more thorough way.

Students Served

In the 1985-86 school year, the FACT$ associates provided financial-aid information and assistance in processing financial-aid forms to juniors, seniors, and recent graduates of the New York City public high schools. Students needing help were given assistance on a first-come, first-served basis. Although the original intent of the program was to serve only students from low-income families, the rising costs of a college education have caused the program to assist students from both low- and middle-

income families.

PROGRAM GOALS

The goals of the FACT$ program were to:

- place at least one FACT$ associate or volunteer in each of the New York City public high schools;
- provide students with the information needed to obtain financial aid applications;
- increase the number of students assisted in completing financial aid applications;
- increase students' ability to complete applications; and
- produce financial aid source materials for school and public distribution.

After consultation with the program coordinator, O.E.A. measured the following as indicators of the degree to which program goals were achieved:

- the number of high schools served by the program;
- the productivity of the associates (number of students helped, number of forms completed, how much time spent with each student);
- the quantity and nature of their training; and
- the attitudes of the associates and college advisors toward the program.

EVALUATION METHODOLOGY

The evaluation, implemented during the spring, 1986 term, utilized interviews, questionnaires, and document review to obtain both quantitative and qualitative data. Evaluators interviewed the FACT$ coordinator and attended advisory board meetings. From March to June, O.E.A. asked program associates to fill out a monthly data form. The quantitative data collected on

the form included the number of students assisted by the associates and the number and type of financial-aid forms completed.

College advisors and the program associates each completed a questionnaire. Questions focused on their duties and responsibilities, the training provided to the associates, staff perceptions of program strengths and weaknesses, and suggestions and recommendations for improvement. Evaluators also reviewed program publications, and minutes of advisory board meetings.

SCOPE OF THIS REPORT

This report presents the results of the evaluation of the high school FACT$ program. Program organization and implementation are described in Chapter II; outcome data, staff perceptions and suggestions for change are summarized in Chapter III; and conclusions and recommendations are discussed in Chapter IV.

II. PROGRAM ORGANIZATION AND IMPLEMENTATION

ORGANIZATION

The central component of FACT$ was the more than 80 associates -- college work/study students -- and 26 volunteers from the School Volunteer program who each spent an average of 10.5 hours a week helping high school students to fill out applications for financial aid for their post-secondary educations. At the 91 participating high schools, the college advisors supervised the associates and volunteers on a day-to-day basis. A Board of Education FACT$ coordinator directed the overall operation of the program, and the School Volunteer Program provided a coordinator for their component. An advisory board set general policy and addressed other broad concerns.

The Board of Education provided a central office, the coordinator's salary and 35 percent of the work/study associates' wages. The rest of the work/study budget came from federal work/study funds made available directly to the universities.

The advisory board was drawn from participating colleges, a post-secondary professional organization, the Governor's Committee on Scholastic Achievement, and the private sector. The board pursued funding for the program, engaged in public relations, and planned for the future of the program. The board met on an as-needed basis.

The FACT$ coordinator was on the staff of the Division of High Schools' Office of College and Career Planning. He directed the daily operation of the program; supervised the recruiting,

selection, placement, and scheduling of the associates; and provided training to and met monthly with the associates. He acted as liaison between the Board of Education and the high school college advisors, the college financial aid offices, and the School Volunteer coordinator. Furthermore, the coordinator prepared the annual budget for the Division of High Schools and represented the Board of Education on the FACT$ Advisory Board. Provision was made for a position of assistant to the coordinator. However, during the 1985-86 school-year this position was not filled and the responsibilities of both positions fell on the coordinator of the program.

The adult volunteers were supervised by the School Volunteer coordinator who also worked with the FACT$ coordinator to integrate the activities of the associates and the volunteers. At the schools, college advisors provided day-to-day supervision to the associates and volunteers and served as a resource for additional information about financial aid. The advisors also reviewed the logs, time sheets, and interview records of the associates.

IMPLEMENTATION

The program coordinator contacted all New York City public high schools to offer the services of FACT$ associates. Fewer than 10 schools did not respond or indicated they were not interested. Because of transportation difficulties of similar problems, it was not possible to place an associate in about 15 schools. Ninety-one of those schools expressing interest

received the services of at least one associate or volunteer, an increase of 10 schools over the previous year.

The process of recruiting and selecting associates varied slightly from college to college. During the summer, N.Y.U. provided the program with a printout of all work/study students for the coming year. The coordinator selected those who would have easy access to different high schools in the city and sent them letters inviting them to interviews at N.Y.U. At the interviews, the applicants were screened for their ability to understand and communicate the program material and for schedules and travel routes that would make working as an associate possible. Associates indicated the high schools they would prefer, and in all but a few cases it was possible to assign them to schools of their choice. In making the assignments, consideration was also given to particular high schools' need for an associate with bilingual ability. At Columbia University, associates were recruited and screened at an annual job fair for work/study students. In the City University of New York (CUNY) system, college work/study coordinators posted notices for the job of associate and students who responded were interviewed. The rest of the process followed the pattern established at N.Y.U.

There were two training sessions for associates at the beginning of the year, each four hours in length. This initial training was supplemented by monthly meetings with the FACT$ coordinator throughout the school year. At these sessions the

coordinator presented information on financial aid, reviewed forms, dealt with work/study requirements, and utilized case studies to help associates with different types of problems, such as difficulties in relations with supervisors or with students they were helping. Attendance for associates at workshops was mandated and they were paid for the hours they were in attendance.

At the schools, college advisors helped the associates to publicize the services they were offering, made space available to them, supervised them, and served as information resources. During the year, the FACT$ coordinator attended three city-wide training sessions for college advisors to introduce the program to them and deal with issues that arose as the program was implemented.

To aid the associates in their work, the FACT$ coordinator published a resource guide of the most frequently used sources of post-secondary financial aid. The guide was translated into five languages and made available to all FACT$ associates and volunteers.

Virtually all of the associates' time at the schools was spent helping students to fill out financial aid forms. The associates' services were available to students on a first-come, first-served basis. At some schools associates worked with college advisors to develop new ways of encouraging students to apply for financial aid, but very little time was spent on this activity. An additional small percentage of their time was spent

on record keeping and other paperwork, and they also attended monthly meetings with the FACT$ coordinator. They were paid $5.00 an hour for up to a maximum of 20 hours a week. Their average number of working hours was 10.5 per week.

III. PROGRAM OUTCOMES

O.E.A. collected data from three sources: the Associates' Data Form and separate questionnaires completed by the college advisors and by the associates. Sixty-one percent of the 75 program associates (N = 46) returned their monthly data forms. Sixty-seven percent of the 75 college advisors in schools staffed by associates (N = 50) and fifty-seven percent of the associates (N = 43) who were involved in the program completed their respective questionnaires.

TRAINING

All of the associates stated that they received training for their position. The average 8.6 hours they reported matched the two half-day sessions reported by the coordinator. Eighty-eight percent of the associates said that they received the majority of their training from the FACT$ coordinator. The associates had two training sessions at the start of the school year and several monthly meetings during the school year that covered new issues and problems as they presented themselves.

The associates' training included: orientation to the financial aid available to students, how to fill out financial aid forms, how to contact students, how to interview and work with students, assistance in conducting workshops, how to disseminate financial aid information, how to keep records of student interviews, and information about which students to assist.

Eighty-four percent of the associates and 86 percent of the college advisors believed that the associates were either very well or well prepared to meet the needs of the students. Only 16 percent of the associates and 14 percent of the college advisors stated that the training was only fair. None in either of the two groups thought that the training was poor or very poor.

PRODUCTIVITY

O.E.A. collected the following data from a sample four month period from March through June, 1986. There were approximately 75 associates serving 75 high schools* throughout the five boroughs of the city. (Due to movement of associates in and out of the program, it was not possible to determine exactly how many participated.) The goal of having at least one FACT$ associate in each of the approximately 120 high schools was not met for three reasons: some schools were too difficult for the available associates to get to, there were not enough qualified associates available to cover all the schools, and eight of the schools contacted stated that they didn't need the additional assistance.

The associates (63 percent female, 37 percent male), who were college students receiving work/study money, came almost entirely from N.Y.U. (86 percent). Columbia and the City University system provided the rest. The typical pattern was that each associate would work one full school day and two other partial days. The associates averaged 10.5 hours of work a week.

*The analysis of productivity did not include the 16 additional high schools served only by volunteers since the volunteers were not the subject of the evaluation.

The majority of the associates were juniors (54 percent) while the remainder were divided among freshman (10 percent), sophomores (13 percent), seniors (15 percent) and graduate students (eight percent).

During the four-month sample period, the associates worked with a total of 1,657 students; 93 percent were seniors, five percent were juniors and two percent were previous high school graduates. During this period, each associate worked, on average, with 60 students. However, there was a wide range in the number of students worked with, from as few as six to as many as 123. One student worked with 68 students in one month alone. The associates were able to assist the students in obtaining and completing 2,421 financial aid forms and/or scholarship applications. The completed forms included 359 CUNY Student Aid Forms (C.S.A.F.), 501 Pell Grant forms for federal financial aid, 527 Financial Aid Forms (FAF) for schools other than CUNY colleges, 562 Tuition Assistance Program forms (TAP) for New York State financial aid and 472 various individual and school scholarship forms. The number of financial-aid forms completed by individual associates during the sample period ranged widely, from three to 151, with a mean of 51 (S.D. = 38.82). Associates spent an average of 32 minutes with each student in order to assist them in completing their forms and applications.

An additional measure related to productivity is the cost to the Board of Education of the service of the associates. Because the Board had to pay only 35 percent of the associates' $5.00 per

hour wages, the school received more than 34,000 hours of service for a direct cost to the Board of slightly more than $60,000. Even when the administrative costs of the coordinator and central FACT$ office are added to this direct cost, these figures suggest that the FACT$ program is cost effective.

BILINGUAL ABILITY

One emphasis of the program was on the bilingual ability of the associates. Approximately 23 percent of the associates (N = 17) were able to communicate with students in a language other than English. Six of the bilingual associates were proficient in Spanish, three spoke Greek, and three spoke Chinese. The remaining five spoke such languages as Korean and Hebrew.

However, only a little more than a third of the college advisors (36 percent) said they preferred a bilingual associate. This relatively low demand for bilingual associates is understandable since only six of the 1,657 students served used a language other than English. This small number may simply indicate that few high school seniors considering post-secondary education have not mastered basic English.

STAFF PERCEPTIONS AND SUGGESTIONS

All of the associates and college advisors judged the program to be successful and, except for one college advisor, agreed that the program should be continued for the following academic year.

The overall opinion of the college advisors was that the

program was a valuable asset and that the assistance of the associate allowed them to work with many more students than was previously possible. Many advisors asked for additional associates or days. Others wanted to use associates to help students with college choices and applications.

Both advisors and associates agreed that more information about various individual and school scholarships should be available. The associates wanted more training in how to fill out the income tax section of certain forms, particularly for students whose families had no reported income or for students with foster parents. In addition, some associates and advisors indicated a need for more systematic ways of increasing students' awareness of the program and contacting students. Some advisors also suggested that the program set priorities for selecting which students to help first. In situations where there were too many requests for help, they felt that prioritizing by grade level, family income, etc., would help associates to decide how to allocate their time.

IV. CONCLUSIONS AND RECOMMENDATIONS

The 1985-86 FACT$ program had mixed success in meeting its goals for the year. Ninety-one of the approximately 120 New York City high schools received the services of FACT$ during 1985-86, an increase of 10 schools over the previous year. This increase leaves the program about 30 schools short of its goal of serving all high schools in the city. Whether those schools still not served need and want program services is a question that needs to be asked. All of the 1,657 students served during the four-month evaluation period received the information they needed to obtain financial aid applications and also improved their ability to complete such applications by having associates work with them in the completion process. The five-language resource guide to financial aid fulfilled the program's goal of producing such material. The final goal of increasing the number of students assisted by the program was not measurable since the program did not keep comparable statistics on the number of students served in 1984-85 and 1985-86.

Among the schools that were served, the productivity of associates differed substantially from school to school. In addition, although bilingual ability was stressed as a qualification for associates, it was a little used resource. The training of the associates was judged adequate, both by the associates and the college advisors, although there were a few topics that could be added to the training agenda.

Nearly all of the college advisors stated that the program

was excellent and that it should be continued. They said that the assistance of the associates enabled them to not only increase the number of students served but also to increase the number of financial aid forms and scholarship applications completed. It is clear that the FACT$ program serves a much needed function in the high schools.

Based on the findings of the evaluation, the following specific recommendations are made:

1. program staff should set clear priorities for selecting which students are to be served first by the program;

2. program staff should work with college advisors to develop a systematic approach to increasing students' awareness of the existence of the program;

3. the advisory board should explore ways of increasing the number of associates in each high school or increasing the number of hours each associate can work;

4. program administrators should maintain monthly records of numbers of students served and forms completed by associates;

5. program staff should examine the factors related to high productivity in associates so that these factors can be fostered throughout the program; and

6. program staff should expand the training of associates to include such specifics as helping students to understand how to fill out the income tax section of forms for students in various circumstances.

APPENDIX

HIGH SCHOOLS PARTICIPATING IN THE
1985-86 FACT$ PROGRAM

HIGH SCHOOL
A. Philip Randolph
Adlai Stevenson
Andrew Jackson
Aviation
Benjamin Cardozo
Boys and Girls
Bronx H.S. of Science
Brooklyn Technical
Bushwick
Canarsie
Charles Evans Hughes H.S. for Humanities
Chelsea
Christopher Columbus
City-as-School
Clara Barton
Curtis
DeWitt Clinton
Edward R. Murrow
Erasmus Hall
Far Rockaway
Fiorello H. LaGuardia H.S. of Music and Arts
Flushing
Forest Hills
Francis Lewis
Franklin D. Roosevelt
Franklin K. Lane
George Washington
George Westinghouse
George W. Wingate
Grace H. Dodge
Grover Cleveland
Harry S. Truman
Herbert H. Lehman
H.S. of Art and Design
H.S. of Fashion Industries
H.S. of Graphic Communication Arts
Hillcrest
Jamaica
James Madison
James Monroe
Jane Adams
John Adams
John F. Kennedy
John Jay
Julia Richmond
Long Island City
Louis D. Brandeis
Lower East Side Prep
Mabel Dean Bacon
Manhattan Center for Science and Mathematics
Martin Luther King, Jr.
Middle College
Midwood
Morris
Murry Bergtraum
New Dorp
New Utrecht
Norman Thomas
Park East
Park West
Port Richmond
Prospect Heights
Ralph R. McKee
Richmond Hill
Samuel Gompers
Samuel J. Tilden
Sarah J. Hale
Satellite Academy for Career Education
Seward Park
Sheepshead Bay
South Bronx
South Shore
Springfield Gardens
Stuyvesant
Susan E. Wagner
Theodore Roosevelt
Thomas A. Edison
Thomas Jefferson
Tottenville
Walton
Washington Irving
William Cullen Bryant
William E. Grady
William H. Maxwell
William H. Taft
John Dewey